Harvard Electricity Policy Group
Sixty-third Plenary Session

Post Fukushima: If not nuclear, what energy mix?

June 2, 2011

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Source: IHS CERA and Ventyx Velocity Suite
US Power Demand: Projected versus Actual

Source: IHS CERA and NERC

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Capital Intensity by Industry

Source: Cambridge Energy Research Associates.
Note: Capital intensity is defined as the three-year average ratio of total assets to total revenue.
Companies are organized by Morgan Stanley’s Global Industry Classification Standard.

Capital Intensity (ratio of total assets to total revenue)
Breakeven Henry Hub Price for Natural Gas Resources in Analyzed Plays

Source: IHS CERA.
Note: Proved, possible, and potential resources.

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Busbar Cost of Competing Generation Options in North America

Source: IHS CERA

*Does not include storage, production (PTC) or investment tax credits (ITC).

Notes: CCGT = combined-cycle gas turbine; SCPC = supercritical pulverized coal.
IGCC = integrated gasification combined-cycle; CT = combustion turbine; CSP = concentrated solar power; PV = Photovoltaics
Delivered fuel prices: natural gas=$5.33/MMBtu; coal=$2.00/MMBtu for SCPC, $1.80/MMBtu for IGCC; nuclear=$0.50/MMBtu. Inflation is 2.0% and financing is 50/50 debt/equity split with 8% cost of debt and 12% cost of equity. (WACC is 8.47%)

LCOE_Model_6_1_11
US Average Retail Power Prices, 1960–2010

Sources: IHS CERA and US Energy Information Administration.
Share of US Power Generation, 1950–2020

Source: Energy Information Administration and IHS CERA.
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